

**The Oak Foundation
Issues Affecting Women Programme's**

**NEW STRATEGY
and
STRATEGIC LEARNING
AND EVALUATION SYSTEM**



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FSG

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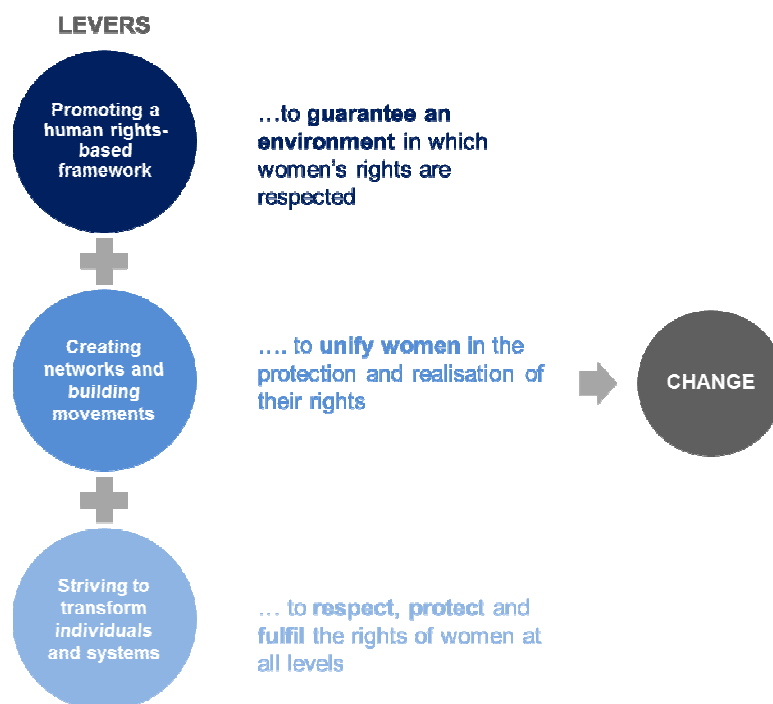
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I. Introduction

a. Background

The Issues Affecting Women Programme (IAWP) developed a new strategic plan over the course of 2011 with two pillars: building women's rights movements and combating violence against women. These pillars branch out into four core Programme Areas: movement building; intra-familial violence; trafficking & exploitation; and violence in situations of crisis. Our Programme strives for impact at the individual, community and systemic levels. As illustrated in Figure 1, we do so by applying a comprehensive social change model to our work through three levers of change: promoting a human rights-based framework; creating networks and building/strengthening movements; and striving to transform individuals and systems.

Figure 1 – Levers of Change



In order to affect change, we will leverage a variety of instruments beyond our traditional grantmaking, including **advocacy, learning, donor “education” and engagement, networking, coalition building, and gender mainstreaming** across the Oak Foundation. This includes collaborating with peer donors and funding sectors to inform philanthropic practice in particular gender mainstreaming and to mobilize increasing resources for women and girls.

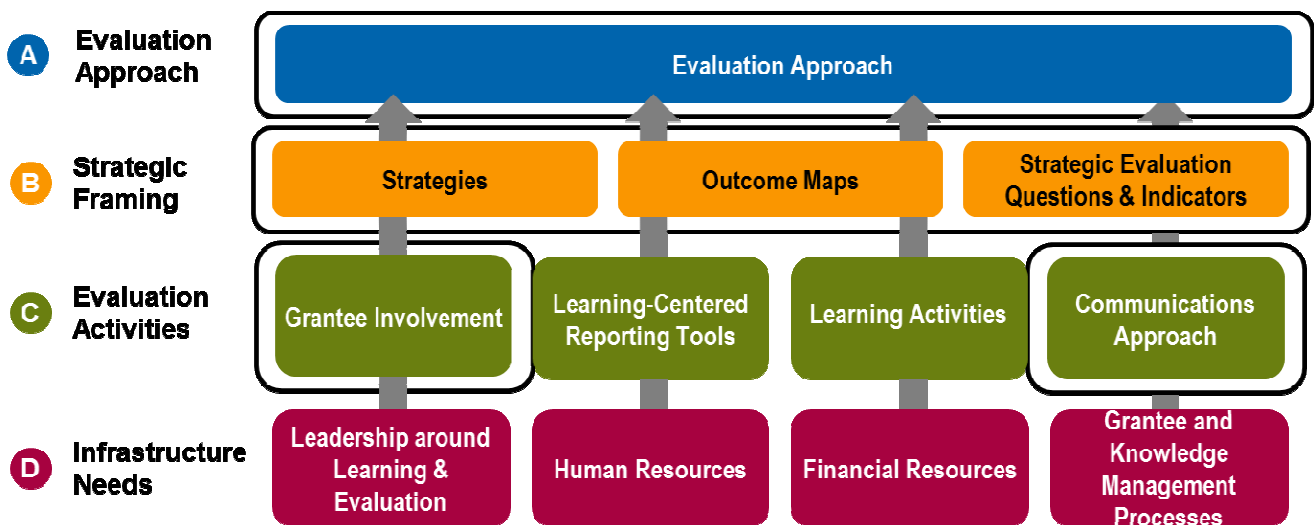
2012 will be the first year of implementation of the new strategy. A critical aspect of the implementation plan will be a strategic learning and evaluation system which will allow us to track our progress and evolve our strategy based on what the Programme and our grantees are learning. This is especially critical as the strategy calls for an experimental approach, hoping to determine tactics and interventions that work. Further, as our Programme works very closely with a community of partners in a cluster-approach, it is vital that key partners understand and support our learning and impact goals and work in partnership with us to answer key learning questions. A cluster approach refers to either a geographic or thematic group of grants and partners whose work is inter-related and iterative. Thus, the learning and evaluation from one grant is relevant to the work of the other organisations that form the cluster.

b. Overview of Strategic Learning and Evaluation System (SLES)

By developing a SLE system, our intention is to have a proactive, integrated, learning-oriented, and responsive set of processes that will ultimately inform our various decision-making needs. This SLE system will ensure that all evaluations will be grounded in questions that matter and that the lessons learned can be meaningfully acted upon.

The SLE system framework, illustrated in Figure 2, is comprised of several interrelated and interdependent components that form a complex and unified whole. The following sections will cover specifically the evaluation approach, the strategic framing as well as elements of the evaluation activities (framed in black).

Figure 2 - The Strategic Learning and Evaluation System Framework



All the components represented above work together to make evaluation a coordinated and efficient process throughout the entire Programme. The following sections go into deeper explanation of each component.

II. Evaluation Vision and Approach

A strategic learning and evaluation system begins with an articulation of the overall evaluation approach, reflecting the values that we hold for evaluation, and communicates:

- Why evaluation is important to us
- What we would like to achieve through evaluation
- How we approach evaluation

The Issues Affecting Women Programme strives to engage in evaluation that is learning-oriented and helps strengthen the women's rights movement and its many actors.

We thus approach evaluation in a way that is:

- **collaborative** – we aim to work with our partners and other actors in the field to contribute to the information we seek to collect, to determine the best ways to go about doing so and to share in the findings
- designed to generate **actionable** and **on-going** learnings – we strive to only gather information that can guide our strategies and decisions; and we view evaluation as an on-going process, not a one-time event at the end of a grant, project or strategy
- **flexible** and **adaptive** to the many dynamic contexts we work in – we work with grantees of all shapes and sizes, working in contexts that are in constant flux; we thus do not subscribe to a rigid one-size-fits-all approach to evaluation
- and **mindful** of our partners' time and resources – we appreciate how precious time and resources are and thus strive to engage in evaluation that is not an onerous side-activity but rather strengthens the internal learning and capacities of our partners

III. Strategic Framing

Implementing a successful SLE system is most effective when it is tied to a clear strategy, articulated goals, and shared understanding of priority questions that need to be answered in order to understand what to measure, when, and how.

a. Overview of IAWP Strategy and Evaluation Questions

The Issues Affecting Women Programme seeks to contribute to a world in which women have the rights, capacity and opportunity to experience safety from violence and to enjoy their full and equal human rights. Our strategy is built on a series of underlying assumptions embedded in our four Programme Areas: movement building; intra-familial violence; trafficking & exploitation; and violence in situations of crisis and informed by several guiding principles.

Key Assumptions

The following assumptions guide our work across our portfolio of grants and activities:

Assumptions

- ✓ The **social marginalization** and **economic and political disempowerment** of women and girls in many parts of the world is a major inhibiting factor to achieving their rights and equality.
- ✓ Enabling women and girls to fully realize their human rights in turn requires **multiple initiatives across many sectors** and the engagement of women at all levels of society from the most local of women's groups to global organisations spanning several continents.
- ✓ Women's rights and roles in society are fundamentally undermined under existing systems of patriarchy and some rights cannot be achieved without looking at the root causes of violations, which are grounded in the system.
- ✓ Violence committed against women and girls in home and society at large is perhaps the most prevalent and virulent obstacle preventing women and girls from attaining and exercising their basic human

rights. Supporting women **victims of violence*** in **reclaiming their lives** and ensuring an environment that secures women's safety and well-being enables women's full and equal participation in society.

- ✓ **Women united** are more powerful and better able to claim their rights than a woman who is alone. Oak strives to connect women at all levels (local, national, regional, and global) to amplify their voices to claim and exercise their rights.

*Throughout this document, IAWP uses the term "victim" in describing women who have experienced violence, as it emphasizes the human rights violation that the woman has experienced. We recognize that some organisations feel that the term victim is stigmatizing to women and prefer instead to use the term "survivor" to emphasize the capacities of women to recover and regain self sufficiency. While our programme is fully committed to promoting agency and empowerment of women who have experienced violence, we use the term "survivor" when a woman has advanced significantly in her recovery process, and has regained much of her self-esteem, self sufficiency and safety.

Guiding Principles

✓ Support a Human Rights Based Approach

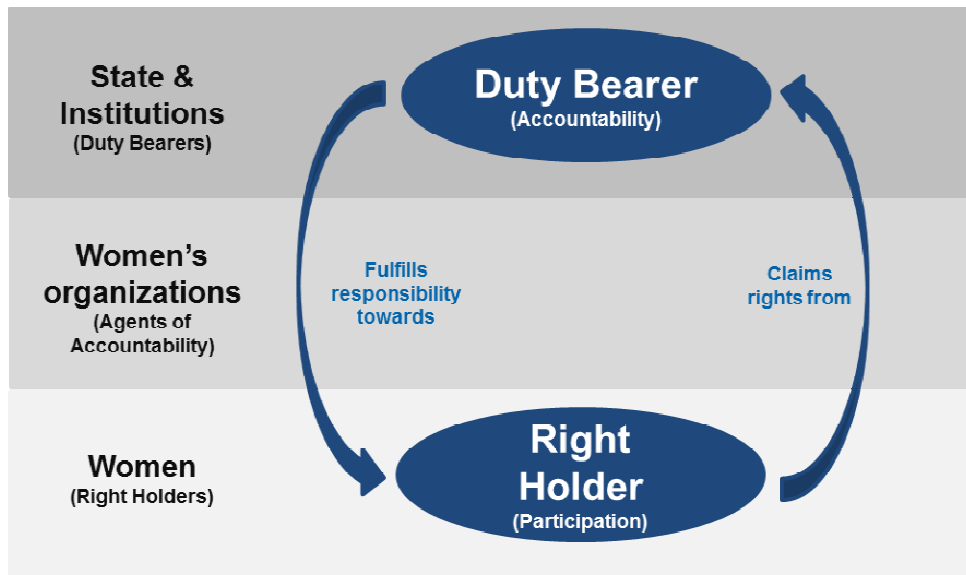
A human rights based approach strives to secure the freedom, well-being and dignity of all people, within the framework of essential standards and principles, duties and obligations. Every human being is recognized both as a person and as a right holder of the full array of rights outlined in international human rights conventions.

This approach posits three levels of obligation for the government: to respect; protect; and fulfil every right:

- **To respect** rights - refrain from interfering with the enjoyment of the right
- **To protect** rights - enact laws that create mechanisms to prevent violation of the right by state authorities or by non-state actors
- **To fulfil** rights - take active steps to put in place institutions and procedures, including the allocation of resources to enable people to enjoy the right

Figure 3 illustrates how the human rights based approach supports mechanisms to ensure that entitlements are attained. By changing the situation of the beneficiary or beneficiary group (i.e. women) from passive victims to right holders, women's organisations and advocates (acting as the agents of accountability) empower women to hold responsible actors (i.e. state and institutions) accountable to human rights standards.

Figure 3 – The Reciprocal Relationship between Rights Holders and Duty Bearers



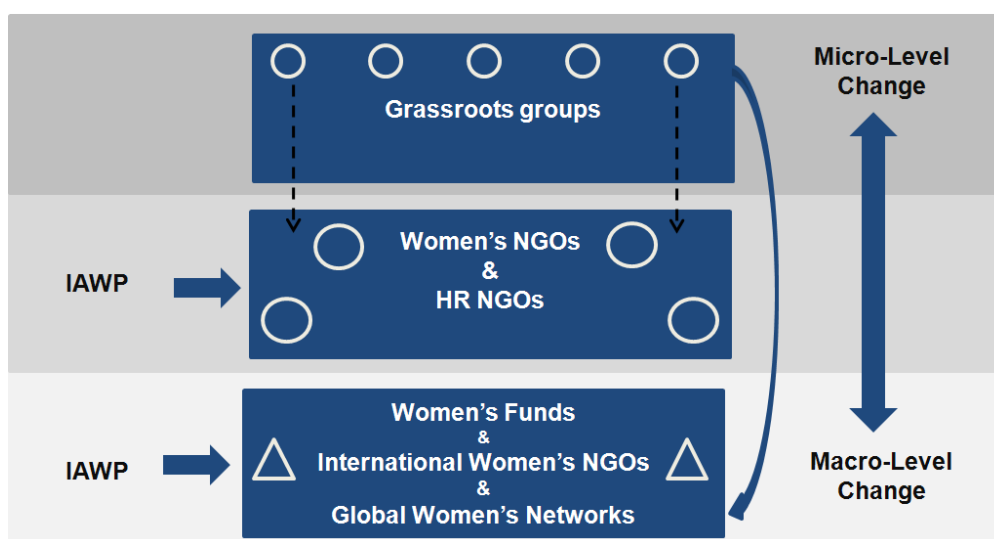
✓ Affect Change at Three Levels

In order to empower a critical mass of women who, through individual agency and collective power, can bring about sustainable social changes, our strategy calls for affecting change at three levels among:

- (1) Grassroots and women's groups and initiatives, which are not necessarily formally constituted or registered;
- (2) Middle-sized women's organisations or organisations with a women's rights programme that we view as "anchors" or that are key to bringing about changes in the field;
- (3) Women's funds, international women's NGOs and global women's coalitions or networks.

Figure 4 illustrates our strategy for affecting systemic change via micro and macro levels of engagement.

Figure 4 – Levels of Change



Women's Funds are international, regional and national grantmakers that support groups working towards women's empowerment, rights and equality. These funds support women and women-led solutions and contribute to building the leadership of grassroots groups that address the issues of women and girls within their contexts. Through their flexible grantmaking processes and their strong local knowledge, women's funds can identify the grassroots groups who, with smaller amounts of funding, can push beyond the status quo to develop strategies that bring about fundamental changes for women in their communities. Women's funds also contribute to the development and empowerment of the groups they support through capacity-building activities related to the planning, budgeting, and monitoring and evaluation of projects from a gender and diversity perspective. Over time, this capacity building support can also transform some of the grassroots group into more established women's organisations. While grantmaking is the backbone of women's funds, they are set apart from other donors by their theory of social change as well as the role they play as change agents in their respective communities. IAWP further values the role of women's funds in movement building in that they strive to ensure that the voices, experiences and perspectives of grassroots women are connected to a larger common agenda of change for women's rights. We further believe that the networks of women's funds engaged in the Global South and East provide a key platform for nurturing strong, effective and financially sustainable women's rights movements.

Likewise, IAWP is committed to supporting **women's organisations, coalitions and networks** that also serve to aggregate and amplify the voices of grassroots women's rights activists at global levels, linking and strengthening these individual parts to build strong, vibrant, and resilient whole women's rights movements. Many of these organisations are also at the forefront of innovations in organising including through social media and technology that can further galvanize a robust constituency in support of women's rights.

Our support for **"middle-sized" women's and human rights NGOs and networks** is further developed in the paragraph below about our intended geographical impact.

✓ **Strive for Impact Predominantly in the Global South and East**

IAWP is committed to providing direct support to women's organisations and networks in the Global South and East that have the potential and the vision to make critical change happen for women's rights. Our support is intended to enable these groups to provide services, promote engagement and awareness, campaign, advance legal frameworks and standards, and/or challenge inequality. We strive to build and strengthen the capacities of and connect these organisations to promote collaboration, learning, and joint advocacy around critical issues such as their sustainability. Additionally, IAWP has a limited presence in the Global North where we strive to reach the most vulnerable women who often have little or no access to public funds and to support innovation and models that can be shared globally.







✓ **Movement Building: both an End as well as a Means to Achieve an Outcome**

We strive to build strong and vibrant women's rights movements, comprised of women that are empowered individually and collectively to challenge patriarchal norms, tackle the root causes of inequality, and demand the full spectrum of their rights. Movement building is therefore an end in itself of the Programme. Additionally, as we strive to end existing patterns of violence in the family, outside the home, and in crisis contexts, we believe that creating networks and building movements are key levers of change for achieving this goal. By seeding, building and connecting networks and coalitions, we thus strive to: achieve a coherent and common in-country approach to ending domestic violence; connect source transit and destination countries to end trafficking and exploitation; and ensure the sustainability of organisations' work, including in situations of crisis.

IAWP Activity Matrix

The Issues Affecting Women Programme engages in a variety of activities within its grant-making:

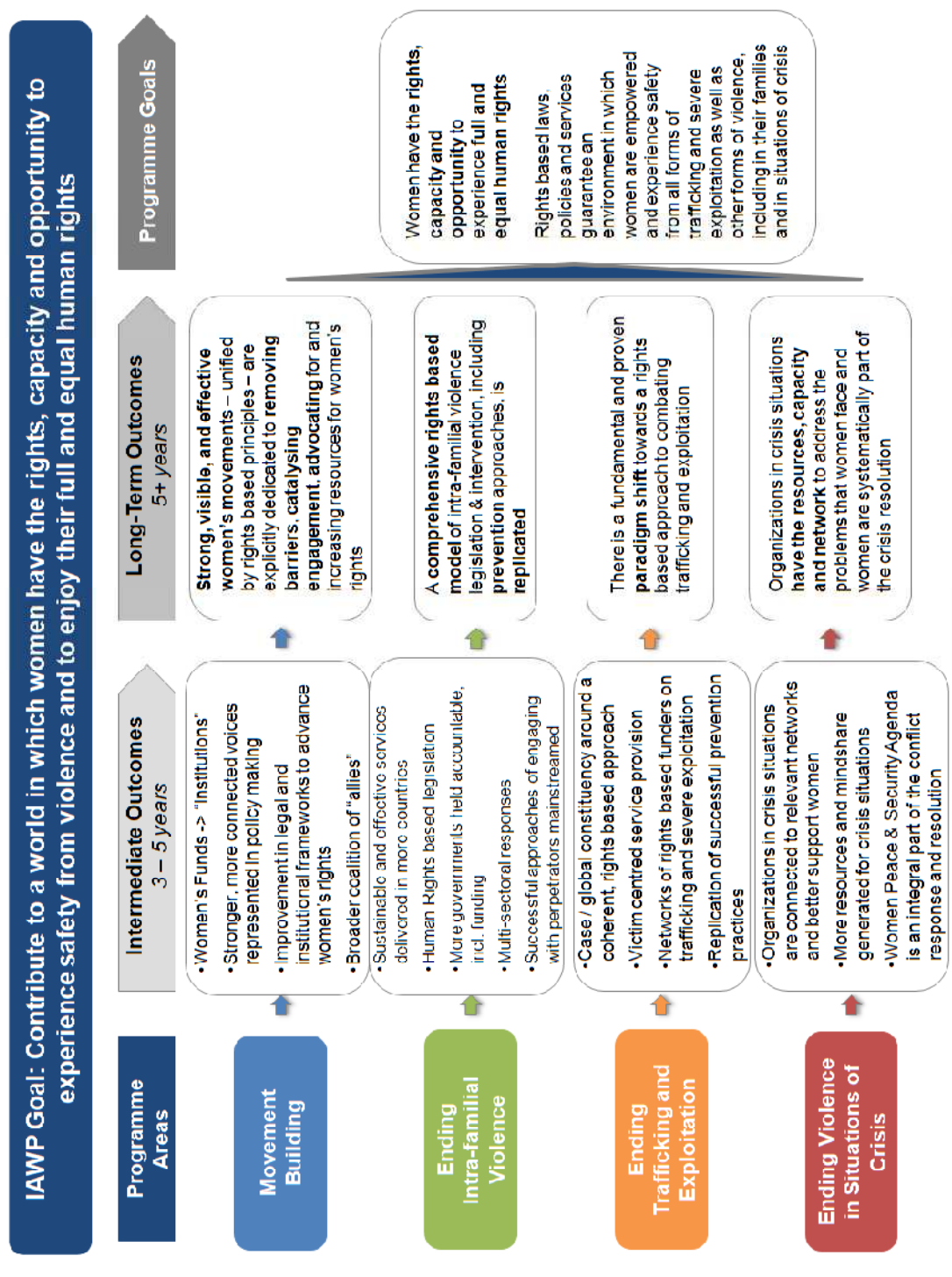
Figure 5 – IAWP Activity Matrix

Type of Activity	Movement Building	Ending Intra-familial Violence	Ending Trafficking and Exploitation	Ending Violence in Situations of Crisis
 <p>Strengthen the capacity of key organisations and actors</p>	Support women's funds and organisations to strengthen, connect and build capacities of grassroots groups to constitute strong women's rights movements	Strengthen organisations and networks that advocate on behalf of victims and/or strive to meet their needs through services that are coordinated and comprehensive and that promote agency, self-representation and empowerment of victims within a rights based framework		Support organisations helping women in situations of crisis
 <p>Seed, build and connect networks and coalitions</p>	Create and strengthen relevant organisations and networks to increase capacity to define a common agenda and raise resources	Create and strengthen relevant organisations and networks to enable a coherent and common in-country approach	Create and strengthen relevant organisations and networks, especially those connecting source, transit and destination countries	Connect organisations helping women in situations of crisis to networks that can help sustain their work
 <p>Support initiatives that advance legal and institutional frameworks as well as their implementation</p>	Support initiatives to change or improve the legal and institutional frameworks, grounded in human rights standards	Ensure that legal and institutional frameworks include sustainability and are monitored rigorously and enforced	Ensure that legal and institutional frameworks are informed by victims' experience , monitored rigorously and enforced	Ensure that women are included in resolving the crisis Women are an integral part of global peace and security agendas.
 <p>Catalyse new knowledge on what works in prevention</p>		Test and document a variety of approaches and begin to build and disseminate an evidence base of what works		
 <p>Sustain and bring new voices, actors and approaches into the movement</p>	Better leverage social media, technology ; Build and broaden constituency of allies , including men; Support women's rights defenders	Break down service silos between women and children who experience violence; Promote positive masculinities	Better understand how to engage at the nexus of trafficking and other severe forms of exploitation and VAW; Broaden constituency of allies	Shine a spotlight on situations of crisis to attract resources, mindshare, and international mobilisation
 <p>Support research and best practice</p>	Raise awareness of critical topics, catalyse improved impact assessments and bring innovation into the women's movements	Expand and help implement an intra-familial research agenda for the field as well as new IAWP horizons	Create and help implement a trafficking and exploitation research agenda for the field that broadens the discourse on T&E	

IAWP Outcome Map

Figure 6 depicts the overall IAWP outcome map. It is important to note that beyond these outcomes, IAWP has strategic evaluation questions that its activities over the coming years will seek to answer. These are captured in the next section of this chapter.

Figure 6 – IAWP Programme Outcome Map*



* N.B. Each Programme's Short-Term Outcomes are featured in the following section: "Programmatic Outcome Maps and Indicators"

Strategic Evaluation Questions

The articulation of the strategic evaluation questions that we are hoping to answer about our Programme's work is a critical component of our strategic learning and evaluation system. When crafted and implemented with care and thought about what information is needed and why, these questions serve as important strategic tools for measuring the extent to which, and how, the Programme is meeting its strategic goals.

Strategic Evaluation Questions

Key Evaluation Questions	
Issues Affecting Women Programme	<ul style="list-style-type: none"> To what extent are we contributing to the field? How can we make the best use of our assets (e.g. time, expertise, networks, funding etc.) How can we strengthen our relationships with our grantees; specifically, how can we: <ul style="list-style-type: none"> better strengthen the capacities of our grantees? reduce grantee and internal team time spent on administrative processes? improve communications with our grantees? What is an appropriate and impactful way to engage men and other potential allies (e.g. governments, donors) in our work and goals? How can we leverage more funding for women and girls' rights? Do we contribute effectively to mainstreaming gender within Oak Foundation?
Movement Building	<ul style="list-style-type: none"> How do Women's Funds (WFs) strengthen the capacity of their grantees (i.e. in the different domains of capacity building) and how can we best contribute to this process? How are WF's and their networks contributing to women's movements building? What is the ideal task/resource allocation between IAWP and Women's Funds with regards to supporting women's groups? How can we help WF's make their case? What are all of the elements of movement building and how are they effectively catalysed?
Ending Intra-Familial Violence	<ul style="list-style-type: none"> What are the elements that need to be catalysed in order to effectively address Intra-familial Violence (IV) at a country level? How can IAWP better capture and use our learning to create effective, tailored country plans to address IV? How can we help services and systems to better explicitly recognize and respond to the connection between women and children experiencing violence/abuse? Which prevention models are the most effective in preventing IV? How do we define quality of services?
Ending Trafficking and Exploitation	<ul style="list-style-type: none"> Is it relevant for IAWP to expand its grantmaking from trafficking to "severe forms of exploitation" ("right" partners, "right" groups at risk, "right" interventions)? In what ways do factors of vulnerability contribute to severe forms of exploitation? What are the elements that need to be catalysed for the adoption and implementation of HR based models in combating trafficking? Which prevention models are the most effective in preventing T&E? How can we best support the self-representation of victims and groups at risk in decision making related to anti-trafficking policies?
Ending Violence in Situations of Crisis	<ul style="list-style-type: none"> What is the most effective and impactful way for us to engage in crisis contexts ("right" crises, right "vectors")?

The following section will dive deeper into each of our four Programme Areas. Each of these is based on a series of key assumptions that will influence its level of success (or failure). They will also be influenced by positive and negative external forces. Also, in each of these areas, we engage in a variety of activities – illustrated in Figure 5 – that are associated with short, intermediate and long term outcomes. In order to be able to track our progress towards achieving these outcomes, relevant indicators will be monitored at different intervals. For simplification purposes, these indicators are not featured in this document. **It is important to note from the outset that outcome maps and associated indicators are not designed to be prescriptive in our grant making process but will serve as an adaptive tool to track our progress and evolve our strategy.**

b. Programmatic Outcome Maps

Movement Building

The Movement Building Programme Area aims at ensuring that women have the rights, capacity and opportunity to experience full and equal human rights.

In order to achieve this goal, the Programme is based on key assumptions that will influence its level of success (or failure).

Assumptions

- ✓ Need to address the full spectrum of women's rights i.e. physical, social, economic and political
- ✓ Need for cohesion, strong organisations, collective power and a shared agenda to build a movement
- ✓ Macro to micro levels of engagement need to take place that include Women's Funds, International Women's Organisations and Networks & Women NGOs and Grassroots groups
- ✓ Need for scale / critical mass to move the agenda
- ✓ Mobilisation of resources leads to mobilisation of attention and action and vice-versa
- ✓ Movements need an infusion of dynamism
- ✓ Need to build and broaden constituency of allies, including men and other social justice movements

In order to function as contributors to movement building in the context in which they work, **Women's Funds** in the Global South and East must meet the following criteria:

- ✓ Committed to diversity
- ✓ Have a feminist and empowering approach
- ✓ Work within a framework of human rights and social change
- ✓ Participate at a global level and positioned to strengthen women's movements in their respective regions

A series of positive and negative external forces will influence the Programme's level of success (or failure).

External Forces

Negative

- ✓ Economic crisis – women made more vulnerable
- ✓ Militarisation – increased violence against women, enforcement of negative models of masculinity and inequality
- ✓ Religious and nationalist fundamentalisms
- ✓ Political instability and/or oppression– implementation difficulties

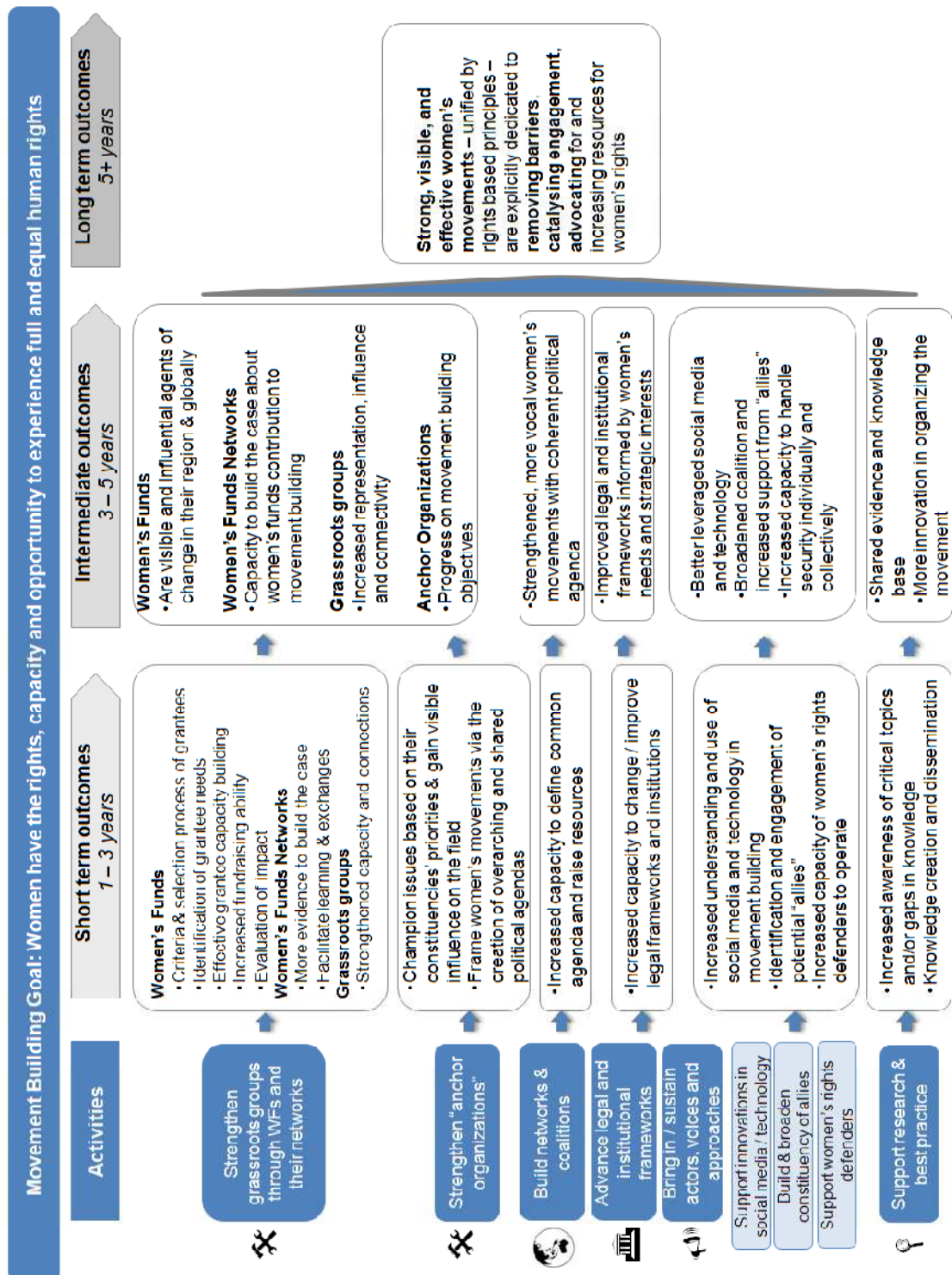
Positive

- ✓ Democratisation process – increased economic and political power of women, as well as control and decision-making over use of resources
- ✓ Role of technology
- ✓ Change in demographics – development of "youth bulge"

Movement Building Outcome Map

Figure 7 depicts the Movement Building Programme Area's activities as well as the expected outcomes from these activities. It is important to note that beyond these outcomes, there are strategic evaluation questions in this Programme Area that these activities will seek to answer. Further, each individual grant and project will be associated with more granular outcomes and indicators which are not shown below.

Figure 7 – Movement Building Outcome Map



Ending Intra-Familial Violence

The Intra-familial Violence Programme Area aims at promoting rights based laws, policies and services to guarantee an environment in which women experience safety from violence and are empowered in their homes and other intimate settings and relationships.

In order to achieve this goal, the Programme is based on key assumptions that will influence its level of success (or failure).

Assumptions

- ✓ Need for existing legal frameworks and public services to provide an “entry point” to IAWP’s activities, including holding states accountable
- ✓ Need for differentiated approach per region / country
- ✓ Need to catalyse innovation or improve services
- ✓ Need to strive for changes at three levels i.e. individual, systemic and institutional
- ✓ Change at the legal level is not enough - need for political will and resources (i.e. skills, money, know how) for actual implementation
- ✓ Women NGOs working on issue of IV should be the advocates of the women victims and contribute to a larger women’s rights agenda
- ✓ Prevention and advocacy should be based on women’s actual experiences
- ✓ Prevention also works on root causes, which include perpetrators’ behavioural change
- ✓ Effective support should also work on women’s empowerment and agency
- ✓ Promoting a “positive masculinities” approach results in increased gender equality and a decrease of intra-familial violence
- ✓ Need to link the response to intra-familial violence for women (i.e. prevention and services) to child protection - impact of violence on the family

To meet the needs of victims, the **services** provided by organisations must be:

- ✓ Coordinated, comprehensive and actively connecting with their peers
- ✓ Promote agency, empowerment and self-representation of survivors within a rights based framework
- ✓ Catalyse innovations or improve services

A series of positive and negative external forces will influence the Programme’s level of success (or failure).

External Forces

Negative

- ✓ Governments’ austerity measures reduce available budget
- ✓ Culture of violence prevails
- ✓ Taboo on domestic violence exposure in many communities
- ✓ Economic crises result in increase in violence

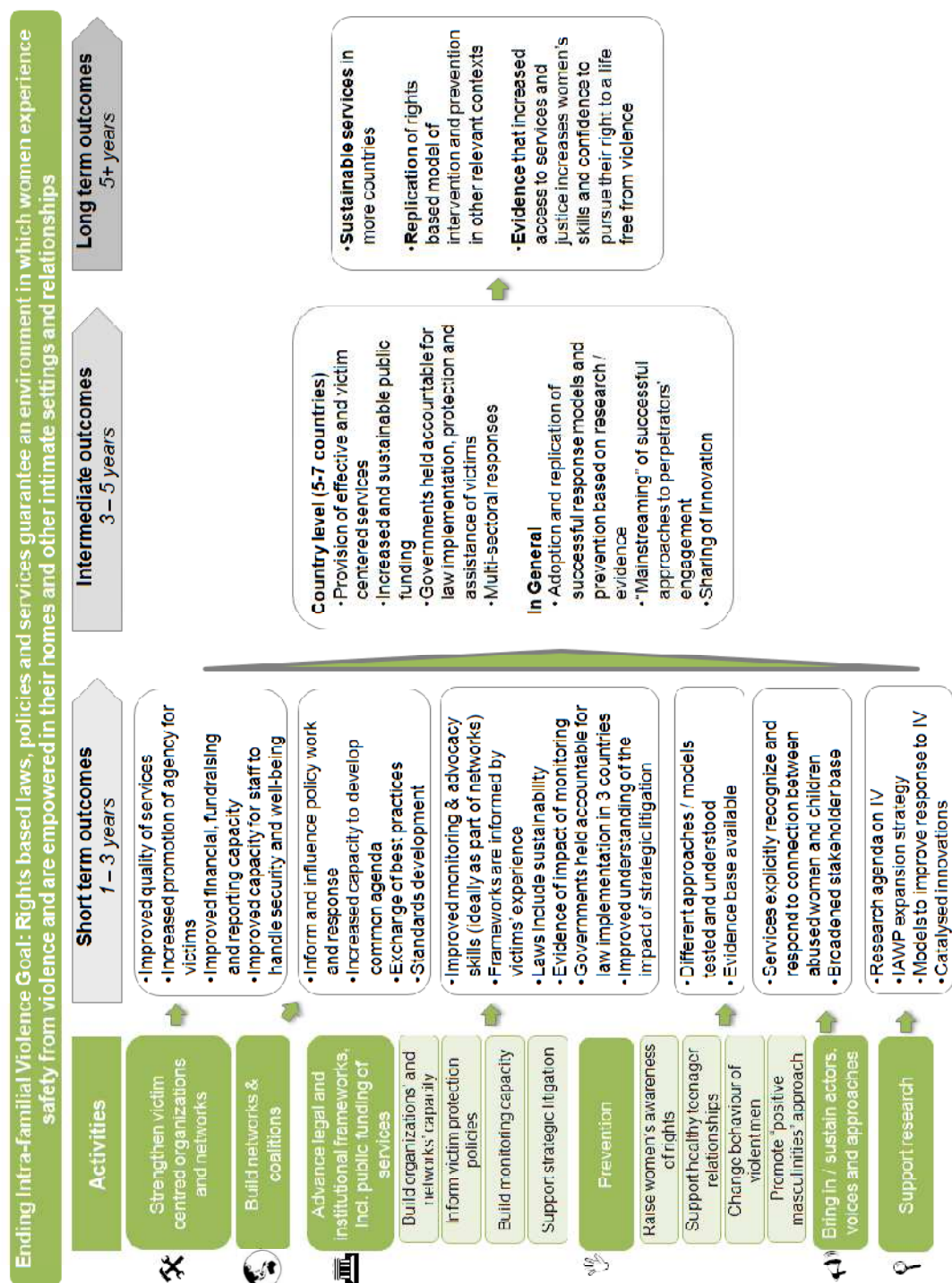
Positive

- ✓ Domestic violence is starting to be recognized as a social (vs. private) issue and is moving up on the political agenda
- ✓ EU accession - positive incentive
- ✓ Increasing voting rights for women and participation in the political process

Ending Intra-Familial Violence Outcome Map

Figure 8 depicts the Ending Intra-Familial Violence Programme Area's activities as well as the expected outcomes from these activities. It is important to note that beyond these outcomes, there are strategic evaluation questions in this Programme Area that these activities will seek to answer. Further, each individual grant and project will be associated with more granular outcomes and indicators, which are not shown below.

Figure 8 – Ending Intra-Familial Violence Outcome Map



Ending Trafficking & Exploitation

The Trafficking & Exploitation Programme Area aims at promoting rights based laws, policies and services that guarantee an environment in which women experience safety from all forms of trafficking and severe forms of exploitation.

In order to achieve this goal, the Programme is based on key assumptions that will determine its level of success (or failure).

Assumptions

- ✓ Need to take into account the complexity of the issue and intersecting political interests
- ✓ Palermo Protocol (PP) provides too narrow a definition of trafficking – many victims do not qualify
- ✓ PP is law enforcement driven while a Human Rights based approach that is victim centered is required to fully protect the victims. Women NGOs working on issues of T&E should be the advocates of women and contribute to a larger women's rights agenda
- ✓ Need to broaden the definition and standards to include severe forms of exploitation, slavery-like conditions, internal trafficking and forced marriage
- ✓ Need to identify categories at risk of trafficking and severe exploitation and include them in the strategy by supporting groups that work to lessen the vulnerabilities of specific target populations e.g. domestic workers, sex workers, migrants, workers in informal / unregulated sectors
- ✓ Need to improve the connection between NGOs in source, transit and destination countries
- ✓ Need for a shift in discourse and response

In order to meet the needs of victims, the **services** provided by organisations must be:

- ✓ Coordinated, comprehensive and actively connecting with their peers
- ✓ Inform advocacy for victim protection
- ✓ Promote agency, empowerment and self- representation of survivors within a rights based framework

A series of positive and negative external forces will influence the Programme's level of success (or failure).

External Forces

Negative

- ✓ Government funding policies are narrow in terms of stipulations
- ✓ Bush administration's anti-prostitution pledge has distorted funding on anti-trafficking
- ✓ Ideology that is counter-productive
- ✓ Moral views, for example on prostitution
- ✓ Anti-prostitution and anti-migration policies often packaged as "anti-trafficking" initiatives
- ✓ Strong wave of anti-migration in the North

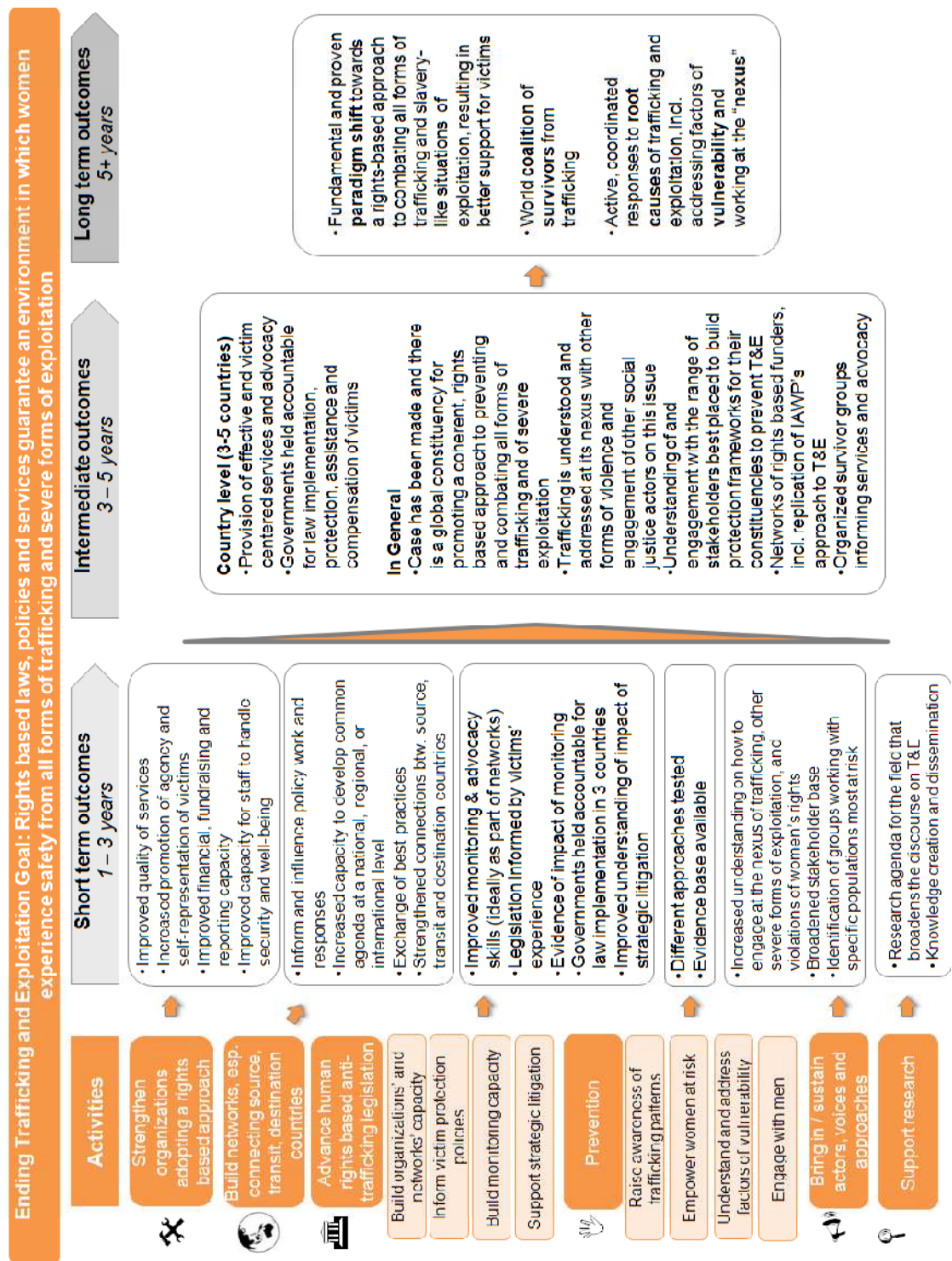
Positive

- ✓ Increased interest and discussion about T&E—i.e. CNN Freedom Project

Ending Trafficking & Exploitation Outcome Map

Figure 9 depicts the Ending Trafficking & Exploitation Programme Area's activities as well as the expected outcomes from these activities. It is important to note that beyond these outcomes, there are strategic evaluation questions in this Programme Area that these activities will seek to answer. Further, each individual grant and project will be associated with more granular outcomes and indicators, which are not shown below.

Figure 9 – Ending Trafficking & Exploitation Outcome Map



Ending Violence in Situations of Crisis

The Violence in Situations of Crisis Programme Area aims at providing flexible and responsive support in crisis zones where violence against women is systemic and stands in the way of rights based recovery, for example in conflict, post-conflict, refugee and immigration settings, and following natural disasters.

In order to achieve these goals, the Programme is based on key assumptions that will influence its level of success (or failure).

Assumptions

- ✓ IAWP can add the most value once the most fundamental humanitarian needs have been addressed by aid organisations
- ✓ IAWP's engagement must be opportunistic, impactful and time-bound
- ✓ To ensure success, IAWP will only engage in situations where there are local women's organisations that Oak can partner with
- ✓ IAWP needs to be aware of sustainability from the outset as its funding will be time-bound and the goal from the outset is eventual exit
- ✓ Collaboration with other funders entering the crisis situation is essential for successful and meaningful intervention.

A series of positive and negative external forces will influence the Programme's level of success (or failure).

External Forces

Negative

- ✓ Escalation of conflict to levels that render the work of women's organisations impossible
- ✓ Increased exposure and harm to the partners and their staff
- ✓ Humanitarian assistance exacerbates existing inequalities and weakens local organisations
- ✓ Violence against women has escalated

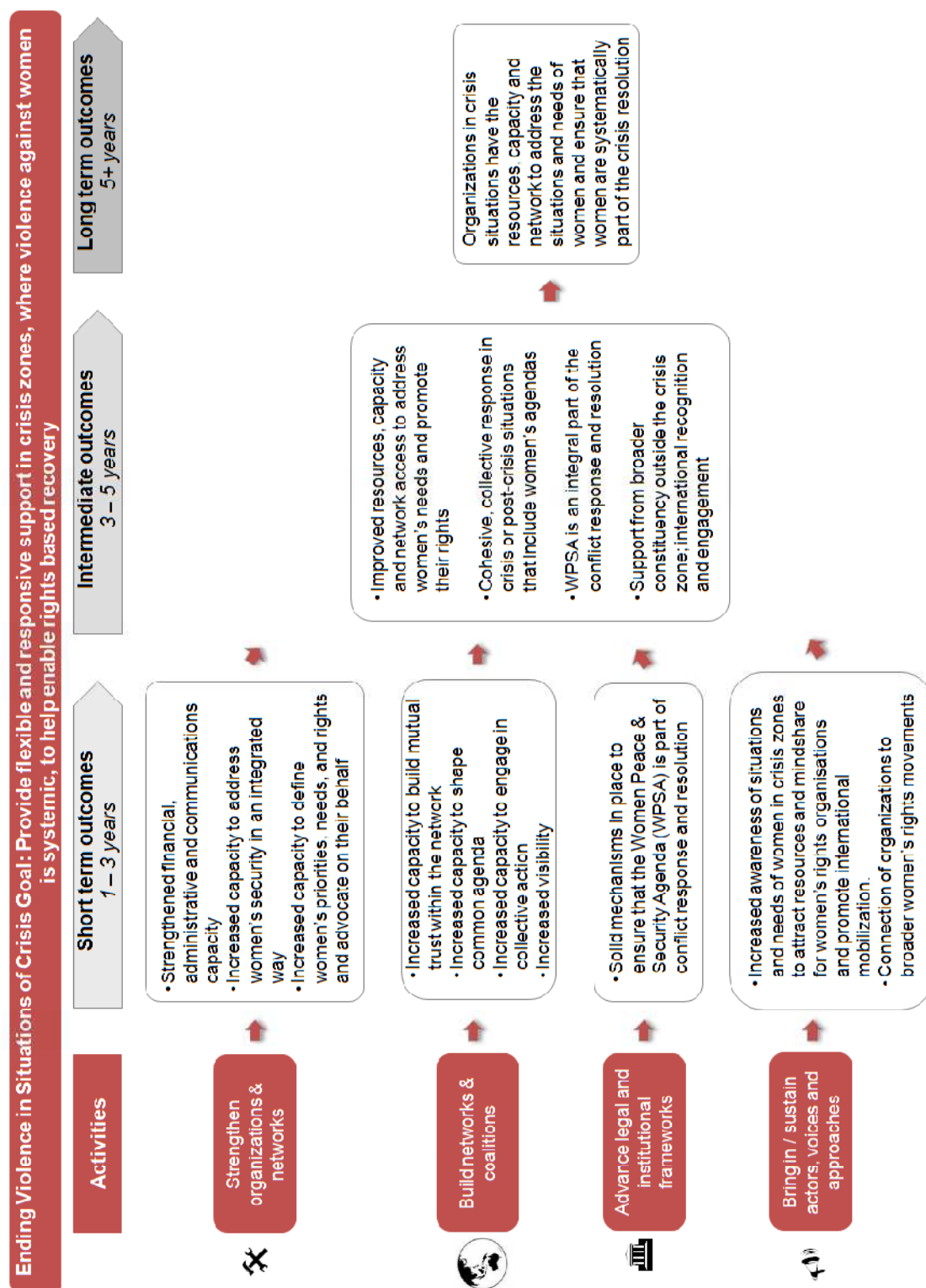
Positive

- ✓ Earlier than anticipated ending of conflict or crisis
- ✓ Influx of more funding for women in situations of crisis
- ✓ Media spotlight and attention
- ✓ Recent international legal developments and global attention paid to the pivotal role of women in peace and security

Ending Violence in Situations of Crisis Outcome Map

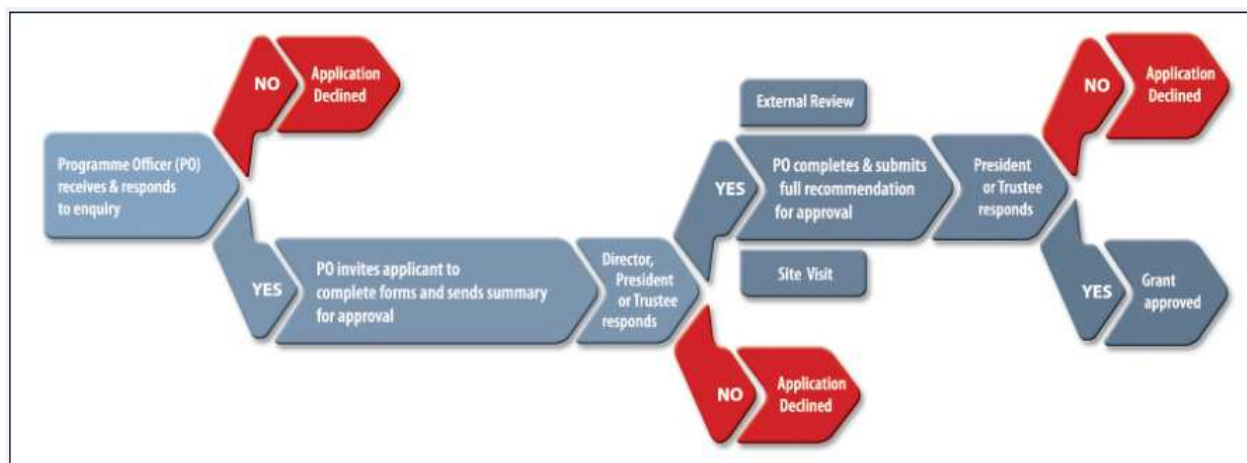
Figure 10 depicts the Ending Violence in Situations of Crisis Programme Area's activities as well as the expected outcomes from these activities. It is important to note that beyond these outcomes, there are strategic evaluation questions in this Programme Area that these activities will seek to answer. Further, each individual grant and project will be associated with more granular outcomes and indicators, which are not shown below.

Figure 10 – Ending Violence in Situations of Crisis Outcome Map



IV. IAWP Decision-Making

The Oak Foundation's decision-making process is illustrated in the figure below. Generally speaking, the first contact with a potential partner is made through trusted advisors, peers, and existing partners during site visits. Those organisations with whom we engage are those that align with our mission, approach, and geographic focus. Very few unsolicited letters of enquiry are invited to submit a full application.



V. Evaluation Activities

The evaluation activities consist of the primary tasks that we will conduct, or commission others to conduct, in order to successfully learn from and evaluate our activities. The following sections cover grantee's involvement in these activities as well as our approach to communicating our progress and results.

Grantee Involvement

We consider evaluation to be an integral component of our programmatic activities that starts long before grantees become partners or initiatives and research projects are launched. As strengthening our partner's capacity is a key element, assessing our partner's needs before designing our support is a critical first step in our Programme's learning and evaluation cycle. Naturally, learning and evaluation also takes place once the grants, initiatives and research projects are launched as well as once they have concluded.

In each of these stages, we **differentiate** learning and evaluation activities, taking the following into consideration:

- **Size of grant**, e.g., small (<\$100K); regular (\$100K to \$250K); large (\$250K to \$500K); major (>\$500K)
- **Nature of grant**, e.g. core versus project support; level of risk / controversy/ innovation
- **Sophistication / maturity of the grantee**, as evidenced by:
 - Existence of international donor base

- Age / stage in lifecycle
- Level of security (i.e. existence of threats in local context)
- Level of evaluation infrastructure
- **Relationship history** (new vs. repeat grantees)

It is important to note that organizing for learning and evaluation does not only take place at the grant level. As noted earlier in this document, we have developed a number of strategic evaluation questions for the coming years. Some of these questions will be answered through the aggregate insights coming from our portfolio of grants and projects in specific Programme Areas while others will be addressed more directly through mechanisms such as external reviews and data from the field and peer donors.

Figure 11 on the page below illustrates the various learning and evaluation (L&E) activities at the grant / project level, necessary to achieve the predetermined goals at each phase of its life cycle: sourcing, due diligence and IAWP support planning; grant implementation; and post grant. Depending on where the grant fits within the considerations listed above, standard and supplemental L&E activities are carried out. Thus, not all of the L&E activities will be utilized for each grant or partner. For example, although IAWP will strive to carry out site visits once a year, but this may not be possible for all partners depending on the geographic focus of the grant. Likewise, external evaluations will be discussed in advance with selected partners to define the parameters, choose the evaluator, etc...

Figure 11 – Standard and Supplemental L&E Activities throughout the Grant / Project Life Cycle

	Sourcing, Due Diligence and IAWP Support Planning	Grant Implementation	Post Grant
GOALS of Learning & Evaluation	<ul style="list-style-type: none"> ✓ Assess fit with IAWP's strategy and learning goals ✓ Assess capacities and capabilities, including financial health and resources, of potential partner ✓ Tailor IAWP support to meet needs of partners and IAWP 	<ul style="list-style-type: none"> ✓ Understand progress of partners toward meeting specific outcomes of grant or project ✓ Develop insights for IAWP's strategic evaluation questions and assumptions and outcome map logic from partner's experiences and expertise 	<ul style="list-style-type: none"> ✓ Understand results in meeting specific outcomes of grant or project ✓ Make progress on answering strategic evaluation questions ✓ Refine IAWP assumptions, strategies and outcome maps
STANDARD Learning & Evaluation Activities	<ul style="list-style-type: none"> • <i>Narrative Grant Application</i> • <i>Financial Review (may not be needed for small grants)</i> 	<ul style="list-style-type: none"> • <i>Progress Reports</i> • <i>6-month phone calls</i> • <i>Site visits</i> 	<ul style="list-style-type: none"> • <i>End of Grant Report</i>
SUPPLEMENTAL Learning & Evaluation Activities	<ul style="list-style-type: none"> • <i>Site visit</i> • <i>External review</i> • <i>Needs assessment & capacity building plan</i> 	<ul style="list-style-type: none"> • <i>In-depth evaluation question exchanges</i> • <i>Supplemental progress materials (narratives, newsletter, promotional materials, Annual Reports etc.)</i> 	<ul style="list-style-type: none"> • <i>Renewal analysis</i> • <i>External evaluation of grant / project</i>

Communication Approach

Our communication approach is a key element in understanding how we will share our evaluation progress and results. Given the collaborative nature of the Programme, sharing information with both internal and external stakeholders in the optimal format will be critical to keeping them informed. Internal stakeholders consist mostly of Oak Foundation staff, Board and peer programmes while the external stakeholders include our partners, peer funders, women's rights movement building partners, etc.

We will leverage a range of communication approaches to reach these various stakeholders / audiences. Further, there are new communication approaches that we will be testing over the next 18 months:

- **Social Media** – we will experiment with more social media tools and channels
- **Webinars** – we will pilot this communication approach for specific topics in 2012/2013
- **State of Learning Report** – in early 2013, we plan to release a short report to all stakeholders summarizing our 2012 learnings in both written and potentially webinar form; if successful, this report could become an annual communication tool

VI. Outlook

We are committed to developing a relevant, credible and useful system for learning and evaluation and will therefore allocate the necessary resources and management support to inform our evaluation activities moving forward. We believe that once the system is in place, it will not only benefit our Programme but also our partners who are involved in its implementation.

When designing and implementing an evaluation system, it is important to recognize that whatever system we implement, it will always be situated within a larger organisational context that is, and will be, influenced and affected by external forces. These forces may include expectations and requirements made by the Foundation's Board members, constraints or needs of partners, or changes in the landscape of our focus areas (including public policy, identification of effective tools and approaches, and shifts in focus of peer funders or other influences). Therefore the system that is developed should not be static – it will need to shift and flex as its context and internal requirements change over time. Maintaining a “living and breathing” SLE system implies continuous work with our partners in a collaborative and participative process. This will ensure that the system evolves along with the needs of our Programme as well as those of our partners.

2012 will be a pilot year for both the new strategy and the new SLE system and we are excited at the prospect of undertaking this journey alongside our partners.



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